



STRATEGIC PLAN

2016-2020

The **Strategic Planning Process** was led by the Strategic Planning Committee, with invaluable input from Shakespeare Dallas Board members, staff (administrative, artists, production), and local community members involved in the arts. The Advisory Board, whose members include prominent members of the Dallas community, provided additional feedback on the planning process. Arts Consulting Group facilitated from start to finish.

STRATEGIC PLANNING COMMITTEE

Karen E. Rodrigues Thomson Reuters
Adam Reed Partner, Meyer Friedman Reed, PLLC
Jennifer Green-Moneta Senior Vice President, Michael A. Burns & Associates
Darren Dittrich Founder and President, Emphasys Technologies
John Hall Owner/President, The Hall Agency, Inc.
Raphael Parry Executive & Artistic Director, Shakespeare Dallas
Jenni Stewart Development & Program Director, Shakespeare Dallas
Jenni Tooley Development and Events Associate, Shakespeare Dallas

ARTS CONSULTING GROUP

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The Shakespeare Dallas Board of Directors and Advisory Board

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BOARD OF DIRECTORS

John Hall (Chairman of the Board) Owner/President, The Hall Agency, Inc.
Marcus Fuller (Treasurer) Liberty Mutual Insurance Co.
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Darren Dittrich Founder and President, Emphasys Technologies
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Nancy Scholberg Pacific Union Financial
Paul Rich Ex-officio
Rebecca Young People Newspaper
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STAFF

Raphael Parry Executive & Artistic Director
Jenni Stewart Program & Operations Director
Julie Osborne Watts Education & Outreach Manager
Jenni Tooley Development & Events Associate
Meaghan Patterson Membership & Marketing Manager
Charley Ford Engagement Coordinator
René Moreno Artistic Associate (2006-2017)
Linda Blase Artistic Associate
Marco Salinas Director of Educational Tours
David Goodwin Director of Training

ADVISORY BOARD

Dolores Barzune
Diane Brierley
David Brown
Travis Carter
Howard Hallam
Donald Stone
Roy G. Turner III

The Organization

Inspired by the egalitarian nature of the New York Shakespeare Festival, Robert “Bob” Glenn started The Shakespeare Festival of Dallas in 1971 as a free summer Shakespeare Festival. In 2005, the company revamped its operations and branded the organization “Shakespeare Dallas” to illustrate the company’s new direction of year-round, affordable and accessible programming. The company serves the community with Shakespeare in the Park outdoor productions, Shakespeare on the Go! education programs for grades 3–12 (Shakespeare Dallas is the area’s only producer of an education program focused on teaching Shakespeare), and Shakespeare Unplugged programs for adults.

Shakespeare Dallas is currently expanding by adding indoor programming, enhanced educational programs for students, and a wider variety of adult events.

The Mission

Using Shakespeare’s works as a cornerstone, Shakespeare Dallas serves the Southwest region with fun and accessible indoor and outdoor theatre, integrated school programs, and cultural enrichment for people of all ages and backgrounds.

Vision Statement

Shakespeare Dallas aspires to be a nationally-recognized “peoples theater” that creates and develops audiences and artists, provides an essential and beloved experience, and is a company poised for future growth.

Values

Fun Diversity Community People Collaboration Integrity

The Strategic Plan

In 2014, Shakespeare Dallas received a grant from the Fidelity Foundation to fund a strategic plan. To receive the funds, Shakespeare Dallas had to raise and match the grant amount, which was achieved through generous funding by the Meadows Foundation, individual supporters of Shakespeare Dallas, and the Board of Directors. The strategic planning process began in early 2015 with the help of Arts Consulting Group; Rebekah Lambert and Heather Kitchen facilitated the entire process. The Strategic Planning Committee led the process with invaluable input

from Shakespeare Dallas Board members, staff (administrative, artists, production), and local community members involved in the arts. The Advisory Board, whose members include prominent members of the Dallas community, provided additional feedback on the planning process. With the goal of having a completed plan in place for 2016–2020, Arts Consulting Group interviewed 45 Shakespeare Dallas stakeholders, provided an online survey that was disseminated through our various email contacts (resulting in 461 responses), and conducted other assessment work, which culminated in an extraordinary amount of information illustrating our strengths, weaknesses, opportunities, and threats (SWOT analysis, see Appendix B). The Strategic Planning Committee used the SWOT analysis and other information gathered by Arts Consulting Group to identify five Strategic Plan priorities and specific objectives to achieve as part of those priorities. The priorities are briefly discussed below and in more detail beginning on page 8.

The purpose of this Strategic Plan is to clarify and solidify the company’s goals, specifically over the next five years and more generally for years beyond 2020.

The Shakespeare Dallas Board of Directors and staff will use the Strategic Plan to guide decisions, establish clear goals and priorities, allocate resources consistently and thoughtfully, and assess progress.

Strategic Plan Priorities

The Strategic Plan focuses on the following five priorities, some of which are solely internal and some are both internal and external.

1. Evolve our **Brand** and Expand our **Audience**
2. Strengthen our **Human Resources**
3. Maintain our **Financial Stability** and Grow our **Revenue**
4. Improve our **Facilities**
5. Extend our **Programs**

Each priority is described in greater detail in the following pages and includes major objectives to achieve relative to that priority along with strategies for achieving those objectives. Major action items for the next five years are included in Appendix A, and the Board anticipates that appropriate committees and staff will make decisions about how best to implement the strategies. Throughout this process, we

will use this Strategic Plan as a check to confirm that the company's direction remains consistent.

*Evolve our Brand and
Expand our Audience*

Objectives

1. Enhance awareness of Shakespeare Dallas and evolve the brand with our current audience.
2. Expand our audience's diversity, geographically and demographically.

Strategies

1. Incorporate newly-defined values into all marketing/advertising/P.R. efforts and promote fun/family/community.
2. Produce advertising that makes Shakespeare more accessible/inclusive and less about the specific plays themselves (*i.e.*, this is the classiest thing you can do in shorts).
3. Develop significant partnerships with various North Texas professional organizations and media outlets for special "Nights at the Park" and other events outside the park.
4. Evolve the branding to coincide with the 50th anniversary in 2021.
5. Enhance coverage of education and outreach programs (*i.e.*, we are more than just Shakespeare in the Park).
6. Explore alternative media outlets to reach a broader audience.

Actions

Actions will be set forth in our annual operating plans and modified by the Marketing Committee and staff as necessary to implement these strategies.

Measures of Success

1. Increase paid audience by 5% by 2017 and 10% by 2020, meaning that we will increase the paid audience from 20,219 in 2015 to 21,229 in 2017 and 22,240 by 2020.
2. Develop one significant partnership that results in a “Night at the Park” in 2016; increase by one more each year.

Strengthen our Human Resources Board Development

Objective

1. Grow the Board into a fully-participating board with representation that reflects our Dallas (and Southwest) community.

Strategies

1. Establish an infrastructure for Board member recruitment.
2. Refine and standardize Board governance principles.
3. Clarify and structure Board financial commitments.
4. Provide motivation and education for Board membership, including an orientation.
5. Research best practices to create a young professionals group that can function as an affinity group and as a feeder for future Board members.

Actions

Actions will be set forth in our annual operating plans and modified by the Board Development Committee and staff as necessary to implement these strategies.

Measures of Success

1. Produce a Board approved one-page summary of Board responsibilities (meeting attendance, committee participation, giving, advocacy, etc.) by June 2016.
2. Successfully recruit two new Board members, one of whom is from the Samuell-Grand neighborhood, by 2017.

Priorities

Strengthen our Human Resources Staffing and Succession Planning

Objectives

1. Retain and develop our current staff (administrative, artists, production).
2. Maintain administrative, artistic, and production staff levels and ensure that Shakespeare Dallas is properly staffed to support current programs and company growth.

Strategies

1. Establish a staffing and compensation plan for the next five years (and potentially beyond).
 - a. Plan and implement professional development for current staff.
 - b. Offer benefits for full-time staff.
 - c. Create an emergency succession plan.
 - d. Create a planned succession plan.

Actions

Actions will be set forth in our annual operating plans and modified by the Board, Executive Director and staff as necessary to implement these strategies.

Measures of Success

1. Recruit a pro-bono HR compensation expert to supervise a compensation study for all personnel at Shakespeare Dallas in 2016.
2. Meet annually with company personnel to discuss plans and actions taken on their behalf, beginning in 2016.

Priorities

Maintain Financial Stability and Grow Revenue

Objectives

1. Continue to maintain financial stability.
2. Ensure that funding proceeds and grows to support program growth.

Strategies

1. Hire a Development Director.
2. Identify and develop relationships with individual stakeholders with an interest in Shakespeare Dallas and capacity to support the organization.
3. Create a development plan and determine major strategies that the Board can and will support.
4. Consistently budget two to three years in advance.
5. Conduct a feasibility study and based on its findings:
 - a. Create an established source of “rainy day” funds (*e.g.*, a reserve fund and a bank line of credit).

- b. Prepare for and launch a capital campaign (see also Facilities priority).
6. Increase our proportion of earned income from 48% to 52% by 2020.

Actions

Actions will be set forth in our annual operating plans and modified by the Development and Finance Committees, other committees and staff as necessary to implement these strategies.

Measures of Success

1. Hire and retain a Development Director in 2016; successfully solicit five new major donors within 12 months of hire.
2. End each season with a \$10K surplus.

Improve our Facilities

Objectives

1. Improve the Samuell-Grand Amphitheater facilities such that they are commensurate with the quality of our programming and maintain a positive audience experience.
2. Analyze and implement the broad-ranging facilities plan.

Strategies

1. Invest in Samuell-Grand Amphitheater by expanding the relationship with the City of Dallas, Park and Recreation Department to secure funding and support for a build-out of Samuell-Grand Amphitheater (inclusion in a bond program and implementation of the 2007 master plan).
2. Implement a full-scale analysis of production/administrative requirements and feasibility to support a full capital campaign. Based on the findings of that analysis:
 - a. Secure a rehearsal hall by 2018.
 - b. Secure a costume/scene shop by 2018.
 - c. Identify potential office space for 2019 and forward.

Actions

Actions will be set forth in our annual operating plans and modified by the Board, executive director and staff as necessary to implement these strategies.

Measures of Success

1. Present a list of desired improvements to Samuell-Grand Amphitheater to City of Dallas, Park and Recreation Department by April 2016; meet and discuss by June 2016.
2. Develop a fundraising feasibility plan for facilities and other infrastructure in 2017.

Extend our Programs

Objectives

1. Extend the geographic reach of our programs and expand art place-making.
2. Develop artists and audiences through diverse offerings.

Strategies

1. Expand outreach and art place-making by working with community and public-sector partners to improve the neighborhood around Samuell-Grand, expand the Latino audience base.
2. Provide professional development for both artists and technicians.
3. Study the feasibility of expanding our programs over the next decade in the following three areas:
 - a. Extend the geographic reach of our programs by offering a new fall season touring location, implement a school tour throughout Texas, and participate in the cultural exchange with Spain and other potential international partners.
 - b. Implement indoor programming by starting a winter season at City Performance Hall.
 - c. Build relationships and collaborate with other Shakespeare companies.

Actions

Actions will be set forth in our annual operating plans and modified by the Board, Artistic Director and staff as necessary to implement these strategies.

Measures of Success

1. Develop two new business or community partnerships from the Samuell-Grand neighborhood by 2017.
2. Hire and retain an Education Director in 2018; complete a feasibility study and planning for the school tour program in 2018.

Appendix A

Five-Year Action Plan

2016 – End of Year Evaluation

- Hire a Development Director. **Completed**
- Establish an emergency succession-plan. **Completed**
- Completely rework the Shakespeare Dallas website. **Completed**
- Review and modernize the Samuell-Grand Amphitheater master plan. **Completed**
- Produce Board-approved one-page summary of Board responsibilities. **Completed**
- Develop one new business or community partnership from the Samuell-Grand neighborhood. **Growth area**
- Begin analysis for potential major indoor production. **In progress**
- Develop significant new “Night at the Park” partner. **Completed**
- Conduct compensation study for all Shakespeare Dallas personnel. **Growth area**
- Implement annual company-wide personnel meetings to discuss plans and actions taken on their behalf. **Completed**
- End fiscal year with \$10K surplus for “rainy day” fund. **Growth area**
- Conduct a feasibility study of adding improvements to Samuell-Grand Amphitheater funded by city bond program. **Completed**

2017

- Achieve 12 fully-participating board members, including one from Samuell-Grand neighborhood.
- Successfully solicit ten new major donors. Major donors are \$5,000 and up per year.
- Begin a feasibility study to hire an Education Director in 2018.
- Hire a Development Manager.
- Establish a planned succession plan for Executive position.

- Develop one new business or community partnership from the Samuell-Grand neighborhood.
- Retire the deficit accrued in 2016 by fiscal year end.
- If analysis proves appropriate, begin implementation of major indoor production for January 2018.
- Develop significant new “Night at the Park” partner.
- Begin analysis of the feasibility of benefits for staff.
- Secure rehearsal space.
- Locate potential spaces for costume/scene shop for 2018 and beyond.

2018

- If analysis proves appropriate, establish a young professionals group.
- Achieve 18 fully-participating board members.
- Add an additional performance location for fall production (indoor or outdoor).
- Develop significant new “Night at the Park” partner.
- End fiscal year with \$10K surplus for “rainy day” fund.
- Study the feasibility of a school tour program and evaluate best practices of education programs throughout North American Shakespeare companies.

2019

- Implement Samuell-Grand Amphitheater improvements through city bond program.
- Implement school tour and best practices of education programs based on analysis.
- Develop significant new “Night at the Park” partner.
- End fiscal year with \$10K surplus for “rainy day” fund.
- Plan a capital campaign for facility needs beyond Samuell-Grand Amphitheater.

2020

- Develop and enhance company branding in anticipation of our 50th anniversary.
- Kick off the capital campaign.
- Achieve a 52%/48% ratio of earned to contributed income.

- Develop significant new “Night at the Park” partner.
- End fiscal year with \$10K surplus for “rainy day” fund.

Appendix B

SWOT Analysis

STRENGTHS

PROGRAMS

- Accessible in many ways
- Easy to go, convenient
- Affordable
- Entertainment value
- Fun
- Cornered the greatest playwright of all time
- Quality of programming
- Expansion of programming
- History and tradition
- Education
- Diversity of audience

DEVELOPMENT

- Long-term relationships with a core group of funders
- A lot of corporate donors for our budget size
- Members – they love us, devoted
- Volunteers
- Advisory Board
- City of Dallas, Park and Recreation relationship (strained in the past, really good now!)
- OCA relationship (10% of budget)
- Solvent, in the black!

STAFF

- Adaptability
- Family
- Distinct organizational culture
- Passion at all levels of the organization
- Staff, Actors, Technicians
- Designers are fantastic
- Great job at paying people consistently
- Technicians, directors better compensated (relative to actors)

FACILITIES

- Easy to go, convenient
- Great venue(s)
- Unique in our space
- Parking at Samuell-Grand Amphitheater, \$0-\$5

MARKETING

- Doing more marketing than we have ever done before (\$75K in kind)
- Free ad agency, discounted PR firm, media support

BOARD

- Board with passion, energy and joy

WEAKNESSES

MARKETING

- Website
- Technology
- Data Collection

DEVELOPMENT

- Data collection
- Weak on metrics

BOARD

- Not enough active bodies on Board
- Not enough bodies with great contacts (corporate and individual)
- Concern about potential Board burn-out, need to ease the burden
- Board engagement in fundraising
- Define responsibility between Board and staff, lack of clarity
- Communication

OPPORTUNITIES

INTERNAL

- Increase marketing
- Improve the website, social media
- Define our target audience and go after it
- Are we “fun, picnic, family” or are we “pearls and high heels?” Can we have a dual message?
- New works, great to see something outside of the canon, staff have this interest
- Having a presence in the arts district
- Collaboration with arts and non-arts organizations
- Bard’s Birthday Bash – Thank you to members and builder of audiences.
Made \$6K net this past year. We would like to make \$20-25K, \$100K would be great. 200 staff hours. Break even when you count the human capital. Should make 4x the amount you’re spending on expenses.

EXTERNAL

- New business moving into North Texas
- Strengthening relationship with OCA, Parks, City Council, Mayor—we need to ask City Hall what their needs are
- Current South Dallas emphasis
- Change in attitude of City regarding outdoor activities, emphasis on parks, walkable, livable environment
- Visitors and Convention Bureau
- Hotel and building concierges
- Newcomers Clubs and similar organizations
- Crystal Charities

THREATS

- Weather dependency
- Lack of public awareness about Shakespeare Dallas
- The way schools teach Shakespeare
- Public perception of Samuell-Grand Park (hot, unsafe, too far)
- Lack of benefits for staff industry-wide (no health, no retirement)
- Structure of Equity guest artist contract (not enough for actors)
- Economy
- Klyde Warren Park, other outdoor activities, other summer theater, other theater groups, movies (how can we leverage that, learn from them)